



JOINING THE ZUNE SOCIAL:

A Global Customer Service Training Partnership

Unique simulation model helps Microsoft Zune's support staff see eye-to-eye with customers in need.

By Cheryl Reed and Darin Hartley

THE COMPANY:
Microsoft

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THE SUPPLIER:
Intrepid Learning Solutions Inc.

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In the fall of 2006, Microsoft launched the Zune MP3 player. The Zune experience included a 30-GB digital media player and an online music service featuring Zune software, the Zune Marketplace, wireless sharing of pictures and music, a built-in FM tuner, and a foundation for an online community that enabled music fans to discover and share new music. In 2007, additional Zune devices were introduced into the market: a sleeker 80-GB device and small 4- and 8-GB flash devices. New functionality was

added to all Zune devices through automatic updates downloaded when customers connected their Zunes to their computers.

The Zune software began to showcase an ever-expanding amount of music and band data online, including more than 3 million songs and hundreds of music videos and podcasts. Customers could purchase music through an "all you can eat" monthly subscription pass, or they could buy each song à la carte using a point system.

A distinguishing feature of the Zune is the ability to manually or automatically sync songs, playlists, albums, pictures, music videos, and podcasts from the software to the device; stream the media to an Xbox or a TV; or share media with other Zunes in the area. The "Zune Social" was expanded to allow customers to personalize Zune cards and send online music messages to their friends through the Zune software using a format similar to that of MySpace.

Because of the unique integrated ecosystem of this new Microsoft product's hardware, software, accessories, and online music service, new Zune customer service agents would quickly need to become product experts to be able to answer questions from Zune users. Free telephone support was offered from 6 a.m. to 10 p.m. to all Zune customers, without restrictions.

There were two unusual challenges in training the agents. The first was that they would have to become proficient in using the product prior to the device being released to the market. Second, once the Zunes were in circulation, one device was available for demonstration in the initial training classes, but it was not possible to provide every agent with his own device to use as a resource while answering calls.

The menus on the Zune were both vertical and horizontal with each screen item clickable to reveal another screen showing further menu options. Even for people who were familiar with using MP3 players (and not all agents were) it was difficult to learn the multiple layers of menu options using static screen shots.

To help customers who called with a "how to" device question, agents needed to be able to accurately describe the sequence of clicks that would enable the customer to move to a particular menu item. Agents trying to perform that task solely from memory without a Zune device in hand created a high risk for error.

Additionally, changes and improvements to the Zune software and Zune

Marketplace could be pushed out anytime by Zune developers through automatic updates when customers connected a Zune to their PC. Because of this there was no dependency on manufacturing. Therefore, the Zune software and Marketplace could and did constantly evolve, changing features or adding functions quickly and regularly.

That made customers happy, but it also made it impossible to create any semblance of stable training materials. The new-hire curricula became quickly outdated in a matter of weeks. As the initial agents were promoted to supervisors or managers, and more Zunes were sold, a steady stream of new agents had to be onboarded and trained. The time and expense of creating and recreating a new hire curriculum in very short time periods to ensure that all information was accurate and up-to-date became a struggle.

Unlike more traditional reusable training designs that take months or certainly weeks to design, develop, and deploy, it soon became clear that to effectively train the globally located customer service experts, a highly modular curriculum composed of small learning objects that could be easily taken apart, rapidly modified, and put back together was needed.

Rather than spending development dollars and time to create core training materials that were showcase-quality in look and feel, it was a better business decision to recognize the need for almost disposable training units that might only have one or two uses before being retired. Investing in the time and expense to develop e-learning that would have a necessarily short shelf-life also had to be carefully evaluated.

On the positive side, having the Zune global training manager organizationally embedded with the Zune Support technical team made the unusually fast development cycle at least feasible; analysis could occur on an ongoing basis, coordinated with the evolving rhythm of the business.

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As solutions to the aforementioned challenges were being explored, several vendors were considered to assist with the development tasks, and eventually, Intrepid Learning Solutions was selected. Intrepid had an existing relationship with Microsoft as a preferred vendor, had done extensive research on the potential of using Zune podcasts in education and training, and had exceptionally skilled instructional experts on staff.

Intrepid is a managed-services company headquartered in Seattle, Washington, with a focus on workplace learning and performance consulting, outsourcing, and research for global companies. It works closely with its clients to establish deep trusted-advisor relationships to enable a profound understanding of the fundamental business challenges a company is experiencing, and then leverages this knowledge into learning and performance solutions that can help overcome those challenges.

Intrepid was first queried about developing a full-blown interactive simulation model that would parallel the actions and responses on the Zune for those agents in the Zune call centers who did not have access to an actual device while on the floor. Intrepid worked closely with the Zune Support technical team to create a fully functional and realistic Zune simulation model.

By using a mouse to click on the Zune buttons or menu options on the model, the screen activity and animation sequences mimicked the real Zune so much that when an actual Zune device was held up parallel to the Zune simulation, the timing of the actions was even synchronized. Intrepid programmed songs, photos, and videos into the model so that users would be able to interact with their desktop model in the same way they would with a device.

The model was also built using technology that can be easily updated—a critical element because Microsoft



continually adds to and improves the functionality of the Zune device through firmware updates pushed out via connection of a user's Zune to his computer.

The simulation was placed on the Microsoft learning management system, and each call center representative downloaded it to his own desktop. Now, when a customer calls to ask a question about the menu functions on the device, agents simply click on the simulation and walk the customer through the explanation while they perform the steps on the model.

Intrepid also worked in close partnership with the Zune Support training team in the modularization process of the curriculum, providing consultative advice in creating a coherent curriculum strategy containing plug-in/plug-out learning objects. Intrepid also provided experienced technical instructional designers to assist in drafting new training content for the modular curriculum.

Additionally, Intrepid worked closely with the Zune team to establish the requirements for an e-learning wrapper that could be used to provide consistent navigation throughout the technology-enabled learning being

provided and would be easily uploaded and downloaded from the LMS so that modifications and changes could be quickly incorporated.

There is no “final” curriculum in Zune, but with the help of Intrepid, there is a clear and connected learning strategy for customer service agents using modular training components that are easy to change, add to, or combine with other units. An interactive building-block combination of instructor-led training, tool-based training with PCs, job aids, e-learning, one-to-one coaching modules, and use of the Zune simulation are mixed and molded for specific uses, depending on the experience and knowledge needs of each agent.

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